

**EPA**United States Environmental Protection Agency  
Washington, DC 20460**Work Assignment**

Work Assignment Number

4-44

☐ Other ☒ Amendment Number:

000002

Contract Number

EP-C-08-010

Contract Period 12/16/2008 To 05/30/2014

Base

Option Period Number 4

Title of Work Assignment/SF Site Name

Workshop

Contractor

SCIENTIFIC CONSULTING GROUP, INC, THE

Specify Section and paragraph of Contract SOW

Purpose:



Work Assignment



Work Assignment Close-Out



Work Assignment Amendment



Incremental Funding



Work Plan Approval

Period of Performance

From 12/01/2012 To: 05/30/2014

Comments:

Technology transfer support for workshop planning &amp; coordination



Superfund

Accounting and Appropriations Data



Non-Superfund

Note: To report additional accounting and appropriations data use EPA Form 1900-69A.

SFO

(Max 2)



Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										

## Authorized Work Assignment Ceiling

Contract Period:

12/16/2008 To 05/30/2014

Cost/Fee:

LOE:

This Action:

Total:

## Work Plan / Cost Estimate Approvals

Contractor WP Dated:

Cost/Fee:

LOE:

Cumulative Approved:

Cost/Fee:

LOE:

Work Assignment Manager Name Abby Waits

(Signature)

(Date)

Branch/Mail Code:

Phone Number 513-569-7884

FAX Number: 513-569-7680

Project Officer Name Melissa Revely-Wilson

(Signature)

(Date)

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FAX Number: 703-347-8696

Other Agency Official Name

(Signature)

(Date)

Branch/Mail Code:

Phone Number:

FAX Number:

Contracting Official Name Camille W. Davis

(Signature)

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## PERFORMANCE WORK STATEMENT

EPA Contract Number: EP-C-08-010

Contractor: Scientific Consulting Group, Inc. (SCG)

EPA Work Assignment Number: 4-44, Extension

**TITLE:** Technology Transfer in Support of Research and Development for Innovative Solutions to Water Challenges

**PERIOD OF PERFORMANCE:** Date of Issuance through May 30, 2014

### BACKGROUND

Innovative technologies hold the key to cost-effective, timely solutions that protect human health and minimize adverse environmental effects. EPA's National Risk Management Research Laboratory (NRMRL) is providing support for water technology collaboration and transfer at EPA Cincinnati to advance the research, development, and deployment (RD&D) of innovative technologies. EPA Cincinnati's goal is to promote innovation in the national water technology sector through research and development, collaboration between internal and external partners, cluster support, technology transfer, and facilitation of intellectual property identification and protection. The outcomes will help EPA and the nation meet the needs identified in the EPA Drinking Water Strategy, Safe Drinking Water Act and Amendments, and Clean Water Act, as well as address other important water challenges, such as infrastructure, stormwater, nutrients, and wastewater management. These activities fall under the EPA Office of Research and Development's (ORD's) Research Action Plan for Safe and Sustainable Water Resources.

Beginning in 2010, EPA Cincinnati took the lead for a program that helped catalyze a public-private partnership focused on environmental technology innovation and commercialization. This charge follows the priorities of the EPA Administrator and the Agency's Chief Financial Officer to develop and deploy innovative environmental technologies in a manner that results in economic growth while protecting human health and the environment. These efforts are being accomplished in part through the collaborative efforts of *Confluence*—a regional Water Technology Innovation Cluster (WTIC) in the Ohio River Valley Region (Southwestern Ohio, Northern Kentucky, and Southeastern Indiana).

In addition to advising *Confluence* on environmental technology issues, EPA is working collaboratively with stakeholders in the region and nation-wide to provide research and insight for advancing improved environmental technologies and practices from proof-of-concept to development and implementation. As part of these efforts, EPA NRMRL has identified a need for informational workshops, webinars, and other activities to provide clarity on the needs and challenges that drive technology innovation; build opportunities for collaborative approaches to technology RD&D; and assist with the transfer of technologies from laboratory to implementation.

### PURPOSE

The purpose of this Performance Work Statement (PWS) is to define the steps that will be needed to provide technology collaboration and transfer support for workshop planning and coordination for the remaining workshop as outlined under the PWS for WA 4-44 related to EPA's role in advancing technology RD&D and coordination with *Confluence*.

### TASK DESCRIPTIONS

The contractor shall furnish all personnel, material, equipment, and services necessary to perform the work outlined in the following tasks and subtasks.

**TASK 1: Prepare Work Plan**

The contractor shall prepare a work plan and cost estimate in accordance with the terms and conditions of the contract. The contractor's work plan should contain a break-out clearly specifying estimates (LOE, ODCs, etc.) associated with performing each of the tasks outlined in this PWS. Additionally, the contractor's work plan should contain a breakout of LOE/costs per meeting for the last remaining meeting outlined in Task 2 and associated subtasks.

**TASK 2: Meeting Logistical Support**

In support of EPA's role in the water technology cluster and other related activities, EPA will be conducting workshops, forums, and meetings to engage stakeholders, build collaborative relationships, and convey information related to technology research, development and implementation. The contractor shall provide logistical and technical meeting support for one remaining meeting carried over from WA 4-44 for a period of performance through May 30, 2014.

The meeting is planned to be held in February-April 2014 (exact dates TBD) and will last up to one day. The meeting facility/location is TBD, however, the meeting will take place in or near Cincinnati, OH. The meeting may include up to 100 participants. Meeting facilities will be provided by EPA or a cosponsor at no cost to EPA. The following subtasks 2.1 through 2.6 outline meeting support that may be required for this meeting.

Oversight of coordination for the meeting will be provided by the EPA WA COR once a contractor work plan has been approved. The EPA WA COR shall receive copies of all deliverables under these tasks. Once confirmed, date(s), topic, facility/location and specific logistical support needed (from among the following subtasks) for the meeting will be provided to and/or confirmed with the contractor via written technical direction from the EPA WA COR.

**TASK 2.1: Meeting Planning**

The contractor shall participate in conference calls with the EPA WA COR and other planning group members. The contractor shall help synthesize and formulate meeting topics, agendas, and recommendations for expert speakers. The contractor shall also participate in periodic calls (approximately twice per week) with the EPA WA COR and/or EPA technical lead(s) to discuss progress and relevant technical issues related to the work assignment tasks.

**TASK 2.2: Pre-Meeting and Registration Materials**

The contractor shall develop draft and final agendas, announcements/invitations, speaker guidelines, logistical information sheets, and other materials as needed. The contractor shall provide draft versions of all materials to the EPA WA COR for review and approval. Final electronic copies shall be sent in source file format (e.g., MSWord 2007) and \*.pdf. As necessary, the contractor shall develop 508 compliant .pdf files or .html versions of final materials for inclusion on a registration web site or other sites. In some cases, the contractor shall be responsible for uploading these materials to a registration web site or other related web sites, as access permits.

The contractor shall compile a spreadsheet or mailing list of potential meeting invitees or participants. These lists shall include potential participants as provided by EPA; the lists may also include potential participants researched and identified by the contractor based on criteria supplied by EPA. The contractor shall distribute

(via email) electronic invitations, agendas, logistical materials, and other pre-meeting informational materials to potential participants.

The contractor shall develop an on-line registration system for tracking responses and registrant information for each meeting. The on-line system shall also include agendas, and other meeting or logistical information. The contractor shall make regular updates to the system to reflect changes in the agenda, schedule, logistics, etc., and shall post meeting-related announcements as available. The system may be linked to EPA or other relevant web sites as identified by the EPA WA COR. The contractor shall also manually enter responses into the registration system as needed. The contractor shall track responses to meeting invitations and monitor on-line registration, and shall provide the EPA WA COR with regular updates on registration and responses. The contractor shall handle or provide the EPA WA COR with materials to handle walk-in (non-preregistered) participants onsite at the meetings.

#### **TASK 2.3: Meeting Folders, Name Badges, and Other Materials/Handouts**

The contractor shall prepare minimal handouts and materials to distribute to meeting participants. Handouts may include copies of final agendas, participant lists, and additional materials as needed. EPA would like to go as paperless as possible when planning and coordinating the meeting. The contractor shall be prepared to upload all meeting materials to the workshop registration site and/or to provide materials to EPA for uploading on other web sites prior to the meeting. Following the meeting, the contractor shall ensure that all final copies of post-meeting materials are made available to participants via the on-line registration web site or some other mechanism.

If required, the contractor shall provide meeting folders containing copies of available agendas, participant lists, presentations, abstracts, evaluation forms, other newsletters or handouts, etc., as determined by the EPA WA COR. The contractor shall design and produce labels or covers for the folders. The contractor shall copy materials to be included in the folders; however, in some cases, EPA may provide materials that should be added to the folders.

The contractor shall develop name badges, exhibitor lists, directional signs, table tents, onsite registration lists and forms, sign-up sheets, evaluation forms, and other registration- and meeting-related materials, as needed. The contractor shall provide services for design and production of meeting-specific artwork and graphics to use on web sites, name badges, agenda, signage, posters, presentation templates, etc. The contractor shall provide copies of draft artwork and graphics to the EPA WA COR for approval before final production.

As needed, the contractor shall ship meeting materials to the EPA WA COR or designated contact at the meeting facility in advance of the meeting. The contractor shall track shipment of materials to ensure they arrive safely and in good condition to the designated EPA or facility addressee. The contractor shall provide return shipping information and supplies in the event that any materials need to be returned to the contractor by the EPA WA COR.

#### **TASK 2.4: Speaker Arrangements**

The contractor shall provide some support to identify and contact potential speakers or contact speakers suggested by the EPA WA COR. The contractor shall engage in discussions with speakers to determine willingness to participate and confirm availability, as needed. The contractor shall provide written (email) guidance to and contact speakers for submission of electronic presentation materials (i.e., PowerPoint slides), abstracts, and short biographies as needed.

Once presentations and other speaker materials have been received, the contractor shall reformat as necessary for copying, uploading and distributing (or posting on web sites). The contractor shall make all speaker

presentations available to the EPA WA COR or EPA technical lead(s) prior to the start of the meeting via CD-ROM or other appropriate electronic media (USB drive), or through email and/or an Internet file-sharing platform. The contractor shall notify speakers who do not submit their presentations prior to the meeting to bring a copy of their electronic file to the meeting.

#### **TASK 2.5: Meeting Evaluation Reports**

The contractor shall prepare a brief summary report of comments received on evaluation forms from meeting participants. The completed evaluation forms will be collected by the EPA WA COR and copies will be mailed to the contractor. The contractor shall provide an electronic copy of the source file (e.g., MSWord 2007) for the summary evaluation report to the EPA WA COR and EPA technical lead(s) within two (2) weeks from receipt of copies of the completed evaluation forms from the EPA WA COR.

#### **TASK 2.6: Post-Meeting Support**

Within one (1) week of the conclusion of the meeting, the contractor shall prepare and forward the following deliverables to the EPA WA COR and EPA technical lead(s): one (1) CD-ROM (or other appropriate electronic media) containing the final post-meeting participants list (updated based on actual attendees and walk-in registrants), final versions of all agendas (formatted), final speaker and/or participant biographies (formatted), electronic copies of posters displayed at the workshop, sign-in sheets, presentation templates (formatted), onsite walk-in registration forms, and any other final materials from the meeting. The contractor shall assure post-meeting materials are updated and posted on the event registration web site as applicable.

### **DELIVERABLES AND PROJECT SCHEDULE**

All deliverables shall be submitted to the EPA WA COR according to the following schedule.

<b>TASK 1: Prepare Work Plan</b>	
Work plan due	In accordance with the contract clauses
<b>TASK 2: Meeting Logistical Support</b>	
<b>Subtask 2.1: Meeting Planning</b>	On-going through 5/30/14 per technical direction from EPA WA COR
<b>Subtask 2.2: Pre-Meeting and Registration Materials</b>	On-going through 5/30/14 per technical direction from EPA WA COR
<b>Subtask 2.3: Meeting Folders, Name Badges, and Other Materials/Handouts</b>	On-going through 5/30/14 per technical direction from EPA WA COR
<b>Subtask 2.4: Speaker Arrangements</b>	On-going through 5/30/14 per technical direction from EPA WA COR
	CD-ROM (or other media) containing 508 compliant presentations and other materials due within two (2) weeks from the conclusion of the meeting
<b>Subtask 2.5: Meeting Evaluation Reports</b>	Summary evaluation report due two (2) weeks from receipt of evaluation forms from EPA WA COR
<b>Subtask 2.6: Post-Meeting Support</b>	One (1) CD-ROM (or other media) containing final copies of participants list, agendas, biographies, posters, sign-in sheets, presentation templates, walk-in registration forms, and any other materials due within one (1) week from conclusion of meeting

## **DELIVERABLE ACCEPTANCE CRITERIA**

The following deliverable acceptance criteria will be used to assess deliverables submitted under the tasks of this PWS.

All deliverables shall be submitted to the EPA WA COR according to schedule and in appropriate formats as outlined in the PWS. All electronic materials should be complete and of high production quality. Reports shall be edited by a technical editor prior to submission to the EPA WA COR. All electronic materials shall comply with Section 508 of the Rehabilitation Act, as well as any other standards or guidance provided through written technical direction from the EPA WA COR.

## **SPECIAL REPORTING**

The contractor's Monthly Progress Report shall include a detailed description of any technical direction issued by the EPA WA COR and accepted by the contractor. The contractor shall maintain a list of all accepted technical direction issued during the work assignment. The contractor's Monthly Progress Report shall also include a break-out of cumulative costs (LOE, ODCs, etc.) associated with performing each of the tasks outlined in this PWS.

## **MANAGEMENT CONTROLS**

Technical direction will be provided by the EPA WA COR throughout performance of the PWS. Periodic meetings between the EPA WA COR and contractor are encouraged to discuss any questions that may arise during the performance or completion of this work assignment. At the EPA WA COR's discretion, these meetings may occur via teleconference or video conferences. The contractor shall document these meetings and submit copies of this correspondence to the EPA WA COR.

The EPA WA COR may identify one or more EPA technical lead(s) for this work assignment. Interaction between the contractor and any EPA technical lead(s) designated by the EPA WA COR is solely for the purpose of presenting and discussing the information, analyses, results or presentations related to this work assignment. The interaction will be technical communication, not technical direction. Per the technical direction clause EPAAR 1552.237-71 of the contract, the EPA PO COR and the EPA WA COR or alternate EPA WA COR are the only representatives of the CO authorized to provide technical direction.

In all meetings, conferences, symposia, etc. participated in as a part of satisfying the terms of this work assignment, contractor personnel shall be clearly identified through the use of name badges that indicate their corporate affiliation. Contractor personnel shall clearly identify themselves as contractors when contacting workshop participants, speakers or other individuals or organizations during the performance of this effort.

The contractor shall ensure that the work done under this project does not contain any real or apparent personal or organizational conflicts of interest.

The contractor shall maintain the confidentiality of any confidential business information collected as part of this effort.

The contractor shall comply with Government Printing Office guidelines during the performance of this effort.

The contractor shall comply with Paperwork Reduction Act guidelines during the performance of this effort.

The contractor shall inform the EPA WA COR verbally or in writing within two (2) businesses day if any significant problems arise, as well as any corrective actions and potential impacts on project deliverables, costs, etc.

## **TRAVEL**

Per the contract clause Local LC-31-08, Approval of Contractor Travel, any non-local travel directly chargeable to this work assignment shall be submitted and approved by the proposed travel dates as identified by the EPA WA COR via technical direction. The contractor is not expected to participate onsite at meetings outlined in this PWS.

### **WORK ASSIGNMENT COR:**

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[Waits.abby@epa.gov](mailto:Waits.abby@epa.gov)

### **ALTERNATE WORK ASSIGNMENT COR:**

Evelyn Hartzell  
EPA/ORD/NRMRL/IO/ETAV  
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**EPA**United States Environmental Protection Agency  
Washington, DC 20460**Work Assignment**

Work Assignment Number

4-44

☐ Other ☒ Amendment Number:

000001

Contract Number

EP-C-08-010

Contract Period 12/16/2008 To 11/30/2013

Base

Option Period Number 4

Title of Work Assignment/SF Site Name

Innovative Solutions to Water

Contractor

SCIENTIFIC CONSULTING GROUP, INC, THE

Specify Section and paragraph of Contract SOW

Purpose:

☐

Work Assignment

☐

Work Assignment Close-Out

☒

Work Assignment Amendment

☐

Incremental Funding

☐

Work Plan Approval

Period of Performance

From 12/01/2012 To 11/30/2013

Comments:

☐

Superfund

Accounting and Appropriations Data

☒

Non-Superfund

SFO  
(Max 2)☐

Note: To report additional accounting and appropriations data use EPA Form 1900-69A.

Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										

## Authorized Work Assignment Ceiling

Contract Period:

Cost/Fee:

LOE:

12/16/2008 To 11/30/2013

This Action:

Total:

## Work Plan / Cost Estimate Approvals

Contractor WP Dated:

Cost/Fee:

LOE:

Cumulative Approved:

Cost/Fee:

LOE:

Work Assignment Manager Name Abby Waits

Branch/Mail Code:

Phone Number 513-569-7884

FAX Number: 513-569-7680

(Signature)

(Date)

Project Officer Name Melissa Revely-Wilson

Branch/Mail Code:

Phone Number: 703-347-8523

FAX Number: 703-347-8696

(Signature)

(Date)

Other Agency Official Name

Branch/Mail Code:

Phone Number:

FAX Number:

(Signature)

(Date)

Contracting Official Name William Yates

Branch/Mail Code:

Phone Number: 513-487-2055

FAX Number:

(Signature)

(Date)

Work Assignment Form. (WebForms v1.0)

## **PERFORMANCE WORK STATEMENT**

**EPA Contract Number:** EP-C-08-010

**Contractor:** Scientific Consulting Group, Inc. (SCG)

**EPA Work Assignment Number:** 4-44

**Amendment Number:** 1

**TITLE:** Technology Transfer in Support of Research and Development for Innovative Solutions to Water Challenges

**PERIOD OF PERFORMANCE:** Date of Issuance through November 30, 2013

**WORK ASSIGNMENT COR:** Abby Waits  
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This work assignment has been amended as follows: removal of one meeting—the Small Business Innovation Research (SBIR) Workshop—from Task 3, including associated subtask 3.11; and removal of several technology transfer products and materials (fact sheets, ecosystem mapping poster, additional technical posters, etc.) from Task 5.

## **BACKGROUND**

Innovative technologies hold the key to cost-effective, timely solutions that protect human health and minimize adverse environmental effects. EPA's National Risk

Management Research Laboratory (NRMRL) is providing support for water technology collaboration and transfer at EPA Cincinnati to advance the research, development, and deployment (RD&D) of innovative technologies. EPA Cincinnati's goal is to promote innovation in the national water technology sector through research and development, collaboration between internal and external partners, cluster support, technology transfer, and facilitation of intellectual property identification and protection. The outcomes will help EPA and the nation meet the needs identified in the EPA Drinking Water Strategy, Safe Drinking Water Act and Amendments, and Clean Water Act, as well as address other important water challenges, such as infrastructure, stormwater, nutrients, and wastewater management. These activities fall under the EPA Office of Research and Development's (ORD's) Research Action Plan for Safe and Sustainable Water Resources.

Beginning in 2010, EPA Cincinnati took the lead for a program that helped catalyze a public-private partnership focused on environmental technology innovation and commercialization. This charge follows the priorities of the EPA Administrator and the Agency's Chief Financial Officer to develop and deploy innovative environmental technologies in a manner that results in economic growth while protecting human health and the environment. These efforts are being accomplished in part through the collaborative efforts of *Confluence*—a regional Water Technology Innovation Cluster (WTIC) in the Ohio River Valley Region (Southwestern Ohio, Northern Kentucky, and Southeastern Indiana).

In addition to advising *Confluence* on environmental technology issues, EPA is working collaboratively with stakeholders in the region and nation-wide to provide research and insight for advancing improved environmental technologies and practices from proof-of-concept to development and implementation. As part of these efforts, EPA NRMRL has identified a need for informational workshops, webinars, and other activities to provide clarity on the needs and challenges that drive technology innovation; build opportunities for collaborative approaches to technology RD&D; and assist with the transfer of technologies from laboratory to implementation.

## **PURPOSE**

The purpose of this Performance Work Statement (PWS) is to define the steps that will be needed to provide technology collaboration and transfer support for workshop planning and coordination, webinars, and other outreach tools and activities related to EPA's role in advancing technology RD&D and coordination with *Confluence*.

## **TASK DESCRIPTIONS**

The contractor shall furnish all personnel, material, equipment, and services necessary to perform the work outlined in the following tasks and subtasks.

### **TASK 1: Prepare Work Plan**

The contractor shall prepare a work plan and cost estimate in accordance with the terms and conditions of the contract. The contractor's work plan should contain a break-out clearly specifying estimates (LOE, ODCs, etc.) associated with performing each of the Tasks 1 through 5 as outlined in this PWS. Additionally, the contractor's work plan should contain a breakout of LOE/costs per meeting for each of the four (4) meetings outlined in Task 3, and then per subtask under Task 3 (for each of the meetings).

## **TASK 2: Work Assignment Kick-Off Meeting**

A work assignment kick-off meeting shall be conducted between the contractor project team, the EPA WA COR, EPA technical lead(s), and designated planning group members to discuss project planning, details, activities, and timelines. The kick-off meeting shall be conducted via conference call within two (2) weeks of work assignment issuance. The contractor shall develop meeting minutes, including key discussion points, action items, and a schedule, and provide to the EPA WA COR.

## **TASK 3: Meeting Logistical Support**

In support of EPA's role in the water technology cluster and other related activities, EPA will be conducting multiple workshops, forums, and meetings to engage stakeholders, build collaborative relationships, and convey information related to technology research, development and implementation. The contractor shall provide logistical and technical meeting support for the following meetings for a period of performance through November 30, 2013:

- *Confluence* Second Anniversary Event—Technology and Policy Nexus, January 16, 2013, EPA Andrew W. Breidenbach Environmental Research Center, Cincinnati, Ohio
- Technology to Empower Citizen Scientists, March 25-27, 2013, Northern Kentucky University, Highland Heights, Kentucky
- Innovative Technologies and Solutions for Non-Potable Reuse of Rain and Storm Water, April 24-25, 2013, Duke Energy Main Offices, Cincinnati, Ohio
- Technology Commercialization Bootcamp, Spring 2013 (dates TBD), EPA Andrew W. Breidenbach Environmental Research Center, Cincinnati, Ohio.

The following subtasks 3.1 through 3.6 outline general meeting support that should be provided for all of the above events. Subtasks 3.7 through 3.10 outline additional details and event-specific support (if applicable) for each of the above workshops or meetings.

Oversight of coordination for the meetings will be provided by the EPA WA COR and/or EPA technical lead(s) to be identified by the EPA WA COR once a contractor work plan has been approved. The EPA WA COR and EPA technical lead(s), as assigned, shall receive copies of all deliverables under these tasks. Once confirmed, date(s), topic, facility/location and specific logistical support needed (from among the following subtasks) for each meeting will be provided to and/or confirmed with the contractor via written technical direction from the EPA WA COR.

**NOTE:** For some of the above meetings, meeting logistical support (e.g., pre-meeting and registration support, development of on-line registration web sites and systems, speaker arrangements, etc.) was begun under the previous work assignment (Contract EP-C-08-010, Work Assignment 3-44). The contractor's work plan and cost estimate should take into consideration funds/LOE already expended toward the planning and coordination of these events and should reflect new work required to complete support for these meetings. Under this work assignment, the contractor shall continue to provide meeting logistical support for the above events as outlined in the following subtasks.

### **TASK 3.1: Meeting Planning**

For each meeting, the contractor shall participate in conference calls with the EPA WA COR, EPA technical lead(s), and other planning group members. The contractor shall interact with EPA and other external planning group members to help synthesize and formulate meeting topics, agendas, and recommendations for expert speakers. The contractor shall develop planning meeting minutes, interim meeting agendas, and other materials consistent with the planning group recommendations and short summaries of the topics discussed and any decisions or action items. The contractor shall also participate in periodic calls (approximately twice per week) with the EPA WA COR and/or EPA technical lead(s) to discuss progress and relevant technical issues related to the work assignment tasks. The contractor shall help recruit potential speakers and meeting participants as outlined in this PWS.

As needed, the contractor shall identify a hotel room block (at government per diem rates) in the vicinity of the meeting location to accommodate non-local participants. The EPA WA COR will confirm the need for a hotel room block and estimated number of rooms needed via technical direction.

### **TASK 3.2: Pre-Meeting and Registration Materials**

For each meeting, the contractor shall develop draft and final agendas, announcements/invitations, speaker guidelines, logistical information sheets, and other materials as needed. The contractor shall provide draft versions of all materials to the EPA WA COR and/or EPA technical lead(s) for review and approval. Final electronic copies shall be sent in source file format (e.g., MSWord 2007) and \*.pdf. As necessary, the contractor shall develop 508 compliant .pdf files or .html versions of final materials for inclusion on a registration web site or other sites. In some cases, the contractor shall be responsible for uploading these materials to a registration web site or other related web sites, as access permits.

For each meeting, the contractor shall compile a spreadsheet or mailing list of potential meeting invitees or participants. These lists shall include potential participants as provided by EPA; the lists may also include potential participants researched and identified by the contractor based on criteria supplied by EPA. The contractor shall distribute (via email) electronic invitations, agendas, logistical materials, and other pre-meeting informational materials to potential participants.

For each meeting, the contractor shall develop an on-line registration system for tracking responses and registrant information for each meeting. The on-line system shall also include agendas, and other meeting or logistical information. The contractor shall make regular updates to the system to reflect changes in the agenda, schedule, logistics, etc., and shall post meeting-related announcements as available. The system may be linked to EPA or other relevant web sites as identified by the EPA WA COR. The contractor shall also manually enter responses into the registration system as needed. The contractor shall track responses to meeting invitations and monitor on-line registration, and shall provide the EPA WA COR or EPA technical lead(s) with regular updates on registration and responses. The contractor shall handle or provide the EPA WA COR with materials to handle walk-in (non-preregistered) participants onsite at the meetings (see subtask 3.3 below).

### **TASK 3.3: Meeting Folders, Name Badges, and Other Materials/Handouts**

For each meeting, the contractor shall prepare minimal handouts and materials to distribute to meeting participants. Handouts may include copies of final agendas, participant lists, and additional materials as needed. EPA would like to go as paperless as possible when planning and coordinating these meetings. The contractor shall be prepared to upload all meeting materials to the workshop registration site and/or to provide materials to EPA for uploading on other web sites prior to the meeting. Following each meeting, the contractor shall ensure that all presentations and/or final copies of post-meeting materials are made available to participants via the on-line registration web site or some other mechanism.

If required, the contractor shall provide meeting folders containing copies of available agendas, participant lists, presentations, abstracts, evaluation forms, other newsletters or handouts, etc., as determined by the EPA WA COR or EPA technical lead(s). The contractor shall design and produce labels or covers for the folders. The contractor shall copy materials to be included in the folders; however, in some cases, EPA may provide materials that should be added to the folders.

For each meeting, the contractor shall develop name badges, exhibitor lists, directional signs, table tents, onsite registration lists and forms, sign-up sheets, evaluation forms, and other registration- and meeting-related materials, as needed. The contractor shall provide services for design and production of meeting-specific artwork and graphics to use on web sites, name badges, agenda, signage, posters, presentation templates, etc. The contractor shall provide copies of draft artwork and graphics to the EPA WA COR or EPA technical lead(s) for approval before final production.

As needed, the contractor shall ship meeting materials to the EPA WA COR, EPA technical lead(s), or designated contact at the meeting facility in advance of the meeting. The contractor shall track shipment of materials to ensure they arrive safely and in good condition to the designated EPA or facility addressee. The contractor shall provide return shipping information and supplies in the event that any materials need to be returned to the contractor by the EPA WA COR or EPA technical lead(s).

#### **TASK 3.4: Speaker Arrangements**

For each meeting, the contractor shall provide some support to identify and contact potential speakers or contact speakers suggested by the EPA WA COR or EPA technical lead(s). The contractor shall engage in discussions with speakers to determine willingness to participate and confirm availability, as needed. The contractor shall develop meeting-specific presentation templates (e.g., in PowerPoint) to provide to speakers [Note: presentation templates and associated graphics should be pre-approved by the EPA WA COR or EPA technical lead(s) as outlined for pre-meeting materials under subtasks 3.2 and 3.3 above]. The contractor shall provide written (email) guidance to and contact speakers for submission of electronic presentation materials (i.e., PowerPoint slides), abstracts, and short biographies as needed.

Once presentations and other speaker materials have been received, the contractor shall reformat as necessary for copying, uploading and distributing (or posting on web sites). The contractor shall make all speaker presentations available to the EPA WA COR or EPA technical lead(s) prior to the start of the meeting via CD-ROM or other appropriate electronic media (USB drive), or through email and/or an Internet file-sharing platform. The contractor shall notify speakers who do not submit their presentations prior to the meeting to bring a copy of their electronic file to the meeting.

As necessary following the meeting, the contractor shall make all presentation files 508 compliant for purpose of posting them to the meeting registration web site or other web sites as applicable. The contractor shall post 508 compliant presentations and other materials as specified by the EPA WA COR or EPA technical lead(s) to the meeting registration web site within one (1) week from the conclusion of the meeting. The contractor shall prepare and forward a CD-ROM containing all 508 compliant presentations and other materials from each meeting (abstracts, bios, presentations, etc.) to the EPA WA COR and EPA technical lead(s) within two (2) weeks from the conclusion of the meeting.

See subtasks 3.8 and 3.9 below for additional event-specific support required from the contractor for making speaker arrangements.

#### **TASK 3.5: Meeting Evaluation Reports**

For each meeting, the contractor shall prepare a brief summary report of comments received on evaluation forms from meeting participants. At each meeting, the completed evaluation forms will be collected by the EPA WA COR or EPA technical lead(s) and copies will be mailed to the contractor. The contractor shall provide an electronic copy of the source file (e.g., MSWord 2007) for the summary evaluation report to the EPA WA COR and EPA technical lead(s) within two (2) weeks from receipt of copies of the completed evaluation forms from the EPA WA COR or EPA technical lead (s).

#### **TASK 3.6: Post-Meeting Support**

Within one (1) week of the conclusion of each meeting, the contractor shall prepare and forward the following deliverables to the EPA WA COR and EPA technical lead(s): one (1) CD-ROM (or other appropriate electronic media) containing the final post-meeting participants list (updated based on actual attendees and walk-in registrants), final versions of all agendas (formatted), final speaker and/or participant biographies (formatted), electronic copies of posters displayed at the workshop, sign-in sheets, presentation templates (formatted), onsite walk-in registration forms, and any other final materials from the meeting. The contractor shall assure post-meeting materials are updated and posted on the event registration web site as applicable.

**The following subtasks 3.7 through 3.10 outline event-specific support (if applicable) for each workshop or meeting in addition to the general meeting support outlined in subtasks 3.1 to 3.6 above.**

**TASK 3.7: *Confluence Second Anniversary Event (January 16, 2013)***

The “*Confluence Second Anniversary Event—Technology and Policy Nexus*” (tentative event title) is planned to be held January 16, 2013. The meeting will last one half (½) to one (1) full day and will be held at the EPA Andrew W. Breidenbach Environmental Research Center, Cincinnati, Ohio. The meeting may include up to 200 participants.

No additional support beyond subtasks 3.1 through 3.6 outlined above will be required for this event.

**TASK 3.8: *Technology to Empower Citizen Scientists Workshop (March 25-27, 2013)***

The workshop “Technology to Empower Citizen Scientists” is planned to be held March 25-27, 2013. The meeting will last up to two and a half (2 ½) days and will be held at the Northern Kentucky University in Highland Heights, Kentucky. The meeting may include up to 60 participants.

In addition to the general meeting support outlined in subtasks 3.1 through 3.6 above, the contractor shall provide the following support for this event.

**TASK 3.8.1: *Technology to Empower Citizen Scientists Workshop: Onsite Meeting Support***

For the “Technology to Empower Citizen Scientists” workshop, the contractor shall provide one (1) meeting coordinator with experience in convening technical meetings and performing registration activities to provide on-site logistical support during the meeting. EPA will confirm the requirement for an on-site meeting coordinator via written technical direction from the EPA WA COR. The contractor shall provide necessary onsite logistical support, including registering attendees, distributing name badges and other meeting materials, ensuring speakers are present, cueing speakers presentations, troubleshooting with the facility, initiating remote or webinar conferencing capabilities, and other general logistical support needed for the meeting. The contractor shall coordinate

with the meeting facility and onsite facility staff as appropriate. [Note: In the event that a meeting is to be held at a facility where onsite facility staff are under contract to the host organization, the contractor shall not initiate discussions with onsite facility staff until appropriate approval is received from the EPA WA COR.]

The contractor shall be prepared to handle walk-in (non-preregistered) participants, including accommodating for onsite registration forms, blank name badges, etc. As applicable, the contractor shall update the final meeting participants list based on information collected during registration and forward to the EPA WA COR and EPA technical lead(s). At the conclusion of the workshop, the contractor shall collect completed evaluation forms from participants. Any original completed evaluation forms shall be forwarded to EPA (see subtask 3.5).

#### **TASK 3.8.2: Technology to Empower Citizen Scientists Workshop: Speaker Arrangements**

For the "Technology to Empower Citizen Scientists" workshop, the contractor shall obtain up to twenty (20) expert guest speakers to provide presentations relevant to the meeting topics and materials and based on expertise criteria provided by EPA and the EPA technical lead(s). Details on the specific number of and criteria for expert speakers for each meeting will be provided via written technical direction from the EPA WA COR. The EPA WA COR or EPA technical lead(s) shall have final approval of guest speakers identified for each meeting. The contractor shall provide written guidance to speakers for submission of presentations and other materials as outlined under Task 3.4 above. The contractor's work plan shall include estimates to provide all costs associated with obtaining up to twenty (20) expert speakers to participate and present at this workshop.

#### **TASK 3.9: Innovative Technologies and Solutions for Non-Potable Reuse of Rain and Storm Water Workshop (April 24-25, 2013)**

The workshop "Innovative Technologies and Solutions for Non-Potable Reuse of Rain and Storm Water" is planned to be held in April 24-25, 2013. The meeting will last up to two (2) days and will be held at the Duke Energy Main Offices in Cincinnati, Ohio. The meeting may include up to 150 participants.

In addition to the general meeting support outlined in subtasks 3.1 through 3.6 above, the contractor shall provide the following support for this event.

##### **TASK 3.9.1: Innovative Technologies and Solutions for Non-Potable Reuse of Rain and Storm Water Workshop: Onsite Meeting Support**

For the "Innovative Technologies and Solutions for Non-Potable Reuse of Rain and Storm Water" workshop, the contractor shall provide one (1) meeting coordinator with experience in convening technical meetings and performing registration activities to provide on-site logistical support during the meeting. EPA will confirm the requirement for an on-site meeting coordinator via written technical direction from the EPA WA

COR. The contractor shall provide necessary onsite logistical support, including registering attendees, distributing name badges and other meeting materials, ensuring speakers are present, cueing speakers presentations, trouble-shooting with the facility, initiating remote or webinar conferencing capabilities, and other general logistical support needed for the meeting. The contractor shall coordinate with the meeting facility and onsite facility staff as appropriate. [Note: In the event that a meeting is to be held at a facility where onsite facility staff are under contract to the host organization, the contractor shall not initiate discussions with onsite facility staff until approval is received from the EPA WA COR.]

The contractor shall be prepared to handle walk-in (non-preregistered) participants, including accommodating for onsite registration forms, blank name badges, etc. As applicable, the contractor shall update the final meeting participants list based on information collected during registration and forward to the EPA WA COR and EPA technical lead(s). At the conclusion of the workshop, the contractor shall collect completed evaluation forms from participants. Any original completed evaluation forms shall be forwarded to EPA (see subtask 3.5).

**TASK 3.9.2: Innovative Technologies and Solutions for Non-Potable Reuse of Rain and Storm Water Workshop: Speaker Arrangements**

For the "Innovative Technologies and Solutions for Non-Potable Reuse of Rain and Storm Water" workshop, the contractor shall obtain up to four (4) expert guest speakers to provide presentations relevant to the meeting topics and materials and based on expertise criteria provided by EPA and the EPA technical lead(s). Details on the specific number of and criteria for expert speakers for each meeting will be provided via written technical direction from the EPA WA COR. The EPA WA COR or EPA technical lead(s) shall have final approval of guest speakers identified for each meeting. The contractor shall provide written guidance to speakers for submission of presentations and other materials as outlined under Task 3.4 above. The contractor's work plan shall include estimates to provide all costs associated with obtaining up to four (4) expert speakers to participate and present at this workshop.

**TASK 3.9.3: Innovative Technologies and Solutions for Non-Potable Reuse of Rain and Storm Water Workshop: Note Taker and Meeting Summary Report**

For the "Innovative Technologies and Solutions for Non-Potable Reuse of Rain and Storm Water" workshop, the contractor shall provide one (1) effective onsite note-taker to record meeting minutes, summary points, action items, and discussion items during the workshop. The contractor shall synthesize information onsite (and provide to the EPA WA COR or EPA technical lead), including action item lists, brief summaries, report outs, etc., as needed. If not developed onsite at the workshop, the contractor shall develop draft action items and forward to the EPA WA COR and EPA technical lead within one (1) week from the conclusion of the workshop.

The contractor shall prepare a draft and final workshop summary report highlighting workshop presentations, discussion points, panel discussions, question and answer

sessions, and final action items. The contractor shall submit electronic copies of the draft summary report, in source file (e.g., MSWord 2007) and \*.pdf formats, to the EPA WA COR and EPA technical lead(s) for initial review and comment. The draft summary report shall be submitted to the EPA WA COR and EPA technical lead(s) within two (2) weeks from the conclusion of each workshop. The contractor shall also send the draft summary report to appropriate planning group members, workshop speakers or other parties as necessary for review and comments.

The contractor shall receive comments, follow up on comments as necessary with reviewers or EPA, and revise the draft summary report. The contractor shall format the final summary report. The contractor shall provide the EPA WA COR and EPA technical lead(s) with the final summary report within one (1) week from the deadline for receipt of comments from all reviewers. The contractor shall have the report edited prior to submitting to EPA. The final meeting summary report should be provided to the EPA WA COR and EPA technical lead(s) electronically, in source file (e.g., MSWord 2007) and \*.pdf formats.

EPA anticipates that up to two (2) review cycles shall be needed to finalize each workshop summary report.

The contractor shall develop electronic copies of the summary report that are suitable for posting to EPA's web site. These electronic copies shall comply with Section 508 of the Rehabilitation Act, as well as any other standards or guidance set or required by EPA ORD.

#### **TASK 3.10: Technology Commercialization Bootcamp (Spring 2013)**

The Technology Commercialization Bootcamp is planned to be held in Spring 2013 (dates TBD). The meeting will last up to one (1) full day and will be held at the EPA Andrew W. Breidenbach Environmental Research Center in Cincinnati, Ohio. The meeting may include up to 100 participants.

No additional support beyond subtasks 3.1 through 3.6 outlined above will be required for this event.

#### **TASK 4: Webinar Support**

In addition to the meetings outlined in Task 3 above, the contractor shall provide logistical and technical support one (1) webinars related to technology development and commercialization. The webinar will be held between January and November 2013 (date TBD). The webinar will last up to one (1) day, and will include up to 150 participants.

For the webinar, the contractor shall provide the following support:

- Make all necessary arrangements for setting up and conducting webinar services
- Host webinar events/materials on own site or provide access to a webinar service or site to manage these activities

- Develop draft and final invitations, agendas, logistical information sheets, and other materials for webinars, as needed; provide draft versions of all materials to the EPA WA COR and/or EPA technical lead(s) for review and approval
- Post .pdf or .html versions of final materials on the webinar site or other web sites
- Distribute (via email) electronic invitations, agendas, logistical materials, and other pre-webinar informational materials to potential participants
- Track participant responses and registrant information for webinars, e.g., through an on-line registration system or some other mechanism, and provide the EPA WA COR or EPA technical lead(s) with regular updates on confirmed participants for each webinar
- Develop guidelines for submission of webinar presentations to the contractor or uploaded directly to the webinar site and distribute guidelines to speakers
- Contact speakers for submission of presentation materials, abstracts, and short biographies as needed
- As needed, upload any speaker presentations, webinar materials, or other information to the webinar site or other web sites prior to the start of the webinar
- Send instructions for accessing webinar conferencing to participants
- Provide logistical support before and during webinars to ensure functionality and trouble-shoot in the event of any issues
- Provide one (1) effective note-taker to participate in webinars and record meeting minutes, summary points, action items, and discussion items.
- Prepare and forward an original and duplicate CD-ROM containing all presentation materials from each webinar (abstracts, bios, presentations, etc.) to the EPA WA COR and EPA technical lead(s) within one (1) week from the conclusion of the webinar
- Prepare a draft and final webinar summary report highlighting key points from presentations, discussion periods, question and answer sessions, and action items
- Submit electronic copies of the draft summary report (in source file format) to the EPA WA COR and EPA technical lead(s) and webinar presenters within one (1) week from the conclusion of each webinar, and the final summary report within three (3) weeks from conclusion of each webinar.

In addition to above support, for the webinar, the contractor shall obtain one (1) expert guest speaker to provide presentations relevant to the webinar topics and materials and based on expertise criteria provided by EPA and the EPA technical lead(s). Details on criteria and presented material for the expert speaker will be provided via written technical direction from the EPA WA COR. The EPA WA COR or EPA technical lead(s) shall have final approval of the guest speaker identified. The contractor shall provide written guidance to the speaker for submission of their presentation and other materials as outlined above. The contractor's work plan shall include estimates to provide all costs associated with obtaining an expert speaker to present on the webinar.

#### **TASK 5: Development of Technology Transfer Documents and Materials**

In keeping with NRMRL's goal of supporting the development and implementation of innovative technology solutions, the contractor shall provide support to develop, finalize and produce technology transfer documents and materials. These materials may include:

- Finalizing the technical cluster project posters (up to 17 posters)
- Finalizing the 100<sup>th</sup> water research anniversary logo/graphic.

In general, technical content for these technology transfer materials will be provided by the EPA WA COR or EPA technical lead(s) or can be synthesized from existing documents or resources. For some materials, the contractor may be required to perform minimal research (Internet or literature searches) to obtain additional information to support development of technology transfer documents and materials.

**NOTE:** Development of the technical posters for EPA cluster funding projects and development of 100<sup>th</sup> water research anniversary graphics was begun under the previous work assignment (Contract EP-C-08-010, Work Assignment 3-44). The contractor's work plan and cost estimate should take into consideration funds/LOE already spent toward development of these materials and should reflect work required to complete these materials.

Under this work assignment, the contractor shall complete development of the above materials.

The contractor shall submit electronic copies of all draft documents, posters or materials, in source file (e.g., InDesign, MSWord 2007) and \*.pdf formats, to the EPA WA COR and EPA technical lead(s) for initial review and comment. The contractor shall receive comments on draft materials, revise materials accordingly, and resubmit materials to the EPA WA COR and EPA technical lead(s) within one (1) week from receipt of comments. The contractor shall submit final, formatted materials to the EPA WA COR and EPA technical lead(s) electronically, in source file (e.g., MSWord 2007) and \*.pdf formats. The contractor shall have all materials edited prior to submitting to EPA. The contractor shall develop electronic copies of materials that are suitable for posting to EPA's technology transfer and collaboration web site as well as other related web sites. These electronic copies shall comply with Section 508 of the Rehabilitation Act, as well as any other standards or guidance set or required by EPA NRMRL.

## **DELIVERABLES AND PROJECT SCHEDULE**

All deliverables shall be submitted to the EPA WA COR according to the following schedule.

<b>TASK 1: Prepare Work Plan</b>	
Work plan due	In accordance with the contract clauses
<b>TASK 2: Work Assignment Kick-Off Meeting</b>	
Kick-off meeting (via conference call)	Within two (2) weeks of work assignment issuance
<b>TASK 3: Meeting Logistical Support</b>	
<b>On-going through 11/30/13</b>	
<b>Subtask 3.1: Meeting Planning</b>	On-going through 11/30/13 for each of the four meetings per technical direction from EPA WA COR
<b>Subtask 3.2: Pre-Meeting and Registration Materials</b>	On-going through 11/30/13 for each of the four meetings per technical direction from EPA WA

	COR
<b>Subtask 3.3:</b> Meeting Folders, Name Badges, and Other Materials/Handouts	On-going through 11/30/12 for each of the four meetings per technical direction from EPA WA COR
<b>Subtask 3.4:</b> Speaker Arrangements	On-going through 11/30/12 for each of the four meetings per technical direction from EPA WA COR
	For each of four meetings: CD-ROM (or other media) containing 508 compliant presentations and other materials due within two (2) weeks from the conclusion of the meeting
	For each of four meetings: posting of 508 compliant presentations and other materials to the registration web site within one (1) week from the conclusion of the meeting
<b>Subtask 3.5:</b> Meeting Evaluation Reports	For each of four meetings: summary evaluation report due two (2) weeks from receipt of evaluation forms from EPA WA COR
<b>Subtask 3.6:</b> Post-Meeting Support	For each of four meetings: one (1) CD-ROM (or other media) containing final copies of participants list, agendas, biographies, posters, sign-in sheets, presentation templates, walk-in registration forms, and any other materials due within one (1) week from conclusion of meeting
<b>Subtask 3.7:</b> Meeting Support for <i>Confluence</i> Second Anniversary Event	Event to be held January 16, 2013; Support on-going through 3/16/13 per technical direction from EPA WA COR
<b>Subtask 3.8:</b> Meeting Support for Technology to Empower Citizen Scientists Workshop	Event to be held March 25-27, 2013; Support on-going through 5/27/13 per technical direction from EPA WA COR
<b>Subtask 3.9:</b> Meeting Support for Innovative Technologies and Solutions for Non-Potable Reuse of Rain and Storm Water Workshop	Event to be held April 24-25, 2013; Support on-going through 6/30/13 per technical direction from EPA WA COR
<b>Subtask 3.9.3:</b> Meeting Summary Report for Innovative Technologies and Solutions for Non-Potable Reuse of Rain and Storm Water Workshop	Workshop action items due one (1) week from the conclusion of the meeting
	Draft summary report due two (2) weeks from the conclusion of the meeting
	Final summary report due one (1) week from the receipt of comments from all reviewers and EPA WA COR
<b>Subtask 3.10:</b> Meeting Support for Technology Commercialization Bootcamp Event	Event to be held Spring 2013; Support on-going through 11/30/13 per technical direction from EPA WA COR
<b>TASK 4: Webinar Support</b>	
Support for up one (1) webinars	On-going through 11/30/13 per technical direction from EPA WA COR
	Original and duplicate CD-ROM containing all webinar presentation materials due within one (1) week from conclusion of webinar

	Draft summary due one (1) week from conclusion of webinar; final summary report due three (3) weeks from conclusion of webinar
<b>TASK 5: Development of Technology Transfer Documents and Materials</b>	
Development of materials, including technical posters and graphics	On-going through 11/30/13 per technical direction from EPA WA COR

## **DELIVERABLE ACCEPTANCE CRITERIA**

The following deliverable acceptance criteria will be used to assess deliverables submitted under Tasks 1 through 5 of this PWS.

All deliverables shall be submitted to the EPA WA COR according to schedule and in appropriate formats as outlined in the PWS. All electronic materials should be complete and of high production quality. Reports shall be edited by a technical editor prior to submission to the EPA WA COR. All electronic materials shall comply with Section 508 of the Rehabilitation Act, as well as any other standards or guidance provided through written technical direction from the EPA WA COR.

## **SPECIAL REPORTING**

The contractor's Monthly Progress Report shall include a detailed description of any technical direction issued by the EPA WA COR and accepted by the contractor. The contractor shall maintain a list of all accepted technical direction issued during the work assignment. The contractor's Monthly Progress Report shall also include a break-out of cumulative costs (LOE, ODCs, etc.) associated with performing each of the Tasks 1 through 5 as outlined in this PWS. Additionally, the contractor's progress report shall include:

- A breakout of LOE/costs per meeting for each of the four (4) meetings outlined in Task 3, and then per subtask under Task 3 (for each of the meetings)
- A breakout of LOE/costs associated with individual technology transfer documents and materials (or products) under Task 5

## **MANAGEMENT CONTROLS**

Technical direction will be provided by the EPA WA COR throughout performance of the PWS. Periodic meetings between the EPA WA COR and contractor are encouraged to discuss any questions that may arise during the performance or completion of this work assignment. At the EPA WA COR's discretion, these meetings may occur via teleconference or video conferences. The contractor shall document these meetings and submit copies of this correspondence to the EPA WA COR.

The EPA WA COR may identify one or more EPA technical lead(s) for this work assignment. Interaction between the contractor and any EPA technical lead(s) designated by the EPA WA COR is solely for the purpose of presenting and discussing the

information, analyses, results or presentations related to this work assignment. The interaction will be technical communication, not technical direction. Per the technical direction clause EPAAR 1552.237-71 of the contract, the EPA PO COR and the EPA WA COR or alternate EPA WA COR are the only representatives of the CO authorized to provide technical direction.

In all meetings, conferences, symposia, etc. participated in as a part of satisfying the terms of this work assignment, contractor personnel shall be clearly identified through the use of name badges that indicate their corporate affiliation. Contractor personnel shall clearly identify themselves as contractors when contacting workshop participants, speakers or other individuals or organizations during the performance of this effort.

The contractor shall ensure that the work done under this project does not contain any real or apparent personal or organizational conflicts of interest.

The contractor shall maintain the confidentiality of any confidential business information collected as part of this effort.

The contractor shall comply with Government Printing Office guidelines during the performance of this effort.

The contractor shall comply with Paperwork Reduction Act guidelines during the performance of this effort.

The contractor shall inform the EPA WA COR verbally or in writing within two (2) businesses day if any significant problems arise, as well as any corrective actions and potential impacts on project deliverables, costs, etc.

## **TRAVEL**

Per the contract clause Local LC-31-08, Approval of Contractor Travel, any non-local travel directly chargeable to this work assignment shall be submitted and approved by the proposed travel dates as identified by the EPA WA COR via technical direction. It is expected that the contractor will be requested to participate at meetings to be held in the Cincinnati-Dayton-Northern Kentucky region between January 2013 and November 2013.

**EPA**United States Environmental Protection Agency  
Washington, DC 20460**Work Assignment**

Work Assignment Number

4-44

☐ Other ☐ Amendment Number:

Contract Number

EP-C-08-010

Contract Period 12/16/2008 To 11/30/2013

Base

Option Period Number 4

Title of Work Assignment/SF Site Name

Tech Trans R&amp;D Water Challenge

Contractor

SCIENTIFIC CONSULTING GROUP, INC, THE

Specify Section and paragraph of Contract SOW

2.1, 2.2, 2.3

Purpose:



Work Assignment



Work Assignment Close-Out



Work Assignment Amendment



Incremental Funding



Work Plan Approval

Period of Performance

From 12/01/2012 To 11/30/2013

Comments:

Technology Transfer in Support of Research and Development for Innovative Solutions to Water Challenges



Superfund

## Accounting and Appropriations Data



Non-Superfund

SFO  
(Max 2)

Note: To report additional accounting and appropriations data use EPA Form 1900-69A.

Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										

## Authorized Work Assignment Ceiling

Contract Period:

Cost/Fee:

LOE:

12/16/2008 To 11/30/2013

This Action:

Total:

## Work Plan / Cost Estimate Approvals

Contractor W/P Dated:

Cost/Fee:

LOE:

Cumulative Approved:

Cost/Fee:

LOE:

Work Assignment Manager Name Abby Waits

Branch/Mail Code:

Phone Number 513-569-7884

FAX Number: 513-569-7680

(Signature)

(Date)

Project Officer Name Melissa Revely-Wilson

Branch/Mail Code:

Phone Number: 703-347-8523

FAX Number: 703-347-8696

(Signature)

(Date)

Other Agency Official Name

Branch/Mail Code:

Phone Number:

FAX Number:

(Signature)

(Date)

Contracting Official Name William Yates

Branch/Mail Code:

Phone Number: 513-487-2055

FAX Number:

(Signature)

(Date)

## **PERFORMANCE WORK STATEMENT**

**EPA Contract Number:** EP-C-08-010

**Contractor:** Scientific Consulting Group, Inc. (SCG)

**EPA Work Assignment Number:** 4-44

**TITLE:** Technology Transfer in Support of Research and Development for Innovative Solutions to Water Challenges

**PERIOD OF PERFORMANCE:** Date of Issuance through November 30, 2013

**WORK ASSIGNMENT COR:** Abby Waits  
EPA/ORD/NRMRL/IO/ETAV  
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### **ALTERNATE WORK ASSIGNMENT COR:**

Evelyn Hartzell  
EPA/ORD/NRMRL/IO/ETAV  
26 W. Martin Luther King Drive, MS274A  
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## **BACKGROUND**

Innovative technologies hold the key to cost-effective, timely solutions that protect human health and minimize adverse environmental effects. EPA's National Risk Management Research Laboratory (NRMRL) is providing support for water technology collaboration and transfer at EPA Cincinnati to advance the research, development, and deployment (RD&D) of innovative technologies. EPA Cincinnati's goal is to promote innovation in the national water technology sector through research and development, collaboration between internal and external partners, cluster support, technology transfer, and facilitation of intellectual property identification and protection. The outcomes will help EPA and the nation meet the needs identified in the EPA Drinking Water Strategy, Safe Drinking Water Act and Amendments, and Clean Water Act, as well as address other important water challenges, such as infrastructure, stormwater, nutrients, and wastewater management. These activities fall under the EPA Office of Research and Development's (ORD's) Research Action Plan for Safe and Sustainable Water Resources.

Beginning in 2010, EPA Cincinnati took the lead for a program that helped catalyze a public-private partnership focused on environmental technology innovation and commercialization. This charge follows the priorities of the EPA Administrator and the Agency's Chief Financial Officer to develop and deploy innovative environmental technologies in a manner that results in economic growth while protecting human health and the environment. These efforts are being accomplished in part through the collaborative efforts of *Confluence*—a regional Water Technology Innovation Cluster (WTIC) in the Ohio River Valley Region (Southwestern Ohio, Northern Kentucky, and Southeastern Indiana).

In addition to advising *Confluence* on environmental technology issues, EPA is working collaboratively with stakeholders in the region and nation-wide to provide research and insight for advancing improved environmental technologies and practices from proof-of-concept to development and implementation. As part of these efforts, EPA NRMRL has identified a need for informational workshops, webinars, and other activities to provide clarity on the needs and challenges that drive technology innovation; build opportunities for collaborative approaches to technology RD&D; and assist with the transfer of technologies from laboratory to implementation.

## **PURPOSE**

The purpose of this Performance Work Statement (PWS) is to define the steps that will be needed to provide technology collaboration and transfer support for workshop planning and coordination, webinars, and other outreach tools and activities related to EPA's role in advancing technology RD&D and coordination with *Confluence*.

## **TASK DESCRIPTIONS**

The contractor shall furnish all personnel, material, equipment, and services necessary to perform the work outlined in the following tasks and subtasks.

### **TASK 1: Prepare Work Plan**

The contractor shall prepare a work plan and cost estimate in accordance with the terms and conditions of the contract. The contractor's work plan should contain a break-out clearly specifying estimates (LOE, ODCs, etc.) associated with performing each of the Tasks 1 through 5 as outlined in this PWS. Additionally, the contractor's work plan should contain a breakout of LOE/costs per meeting for each of the five (5) meetings outlined in Task 3, and then per subtask under Task 3 (for each of the meetings).

### **TASK 2: Work Assignment Kick-Off Meeting**

A work assignment kick-off meeting shall be conducted between the contractor project team, the EPA WA COR, EPA technical lead(s), and designated planning group members to discuss project planning, details, activities, and timelines. The kick-off meeting shall be conducted via conference call within two (2) weeks of work assignment issuance. The contractor shall develop meeting minutes, including key discussion points, action items, and a schedule, and provide to the EPA WA COR.

### **TASK 3: Meeting Logistical Support**

In support of EPA's role in the water technology cluster and other related activities, EPA will be conducting multiple workshops, forums, and meetings to engage stakeholders, build collaborative relationships, and convey information related to technology research, development and implementation. The contractor shall provide logistical and technical meeting support for the following meetings for a period of performance through November 30, 2013:

- *Confluence* Second Anniversary Event—Technology and Policy Nexus, January 16, 2013, EPA Andrew W. Breidenbach Environmental Research Center, Cincinnati, Ohio
- Technology to Empower Citizen Scientists, March 25-27, 2013, Northern Kentucky University, Highland Heights, Kentucky
- Innovative Technologies and Solutions for Non-Potable Reuse of Rain and Storm Water, April 2013 (dates TBD), Duke Energy Main Offices, Cincinnati, Ohio

- Technology Commercialization Bootcamp, Spring 2013 (dates TBD), EPA Andrew W. Breidenbach Environmental Research Center, Cincinnati, Ohio
- Small Business Innovation Research (SBIR) Workshop, dates and location TBD.

The following subtasks 3.1 through 3.6 outline general meeting support that should be provided for all of the above events. Subtasks 3.7 through 3.11 outline additional details and event-specific support (if applicable) for each of the above workshops or meetings.

Oversight of coordination for the meetings will be provided by the EPA WA COR to be identified by the EPA WA COR once a contractor work plan has been approved. The EPA WA COR, as assigned, shall receive copies of all deliverables under these tasks. Once confirmed, date(s), topic, facility/location and specific logistical support needed (from among the following subtasks) for each meeting will be provided to and/or confirmed with the contractor via written technical direction from the EPA WA COR.

**NOTE:** For some of the above meetings, meeting logistical support (e.g., pre-meeting and registration support, development of on-line registration web sites and systems, speaker arrangements, etc.) was begun under the previous work assignment (Contract EP-C-08-010, Work Assignment 3-44). The contractor's work plan and cost estimate should take into consideration funds/LOE already expended toward the planning and coordination of these events and should reflect new work required to complete support for these meetings. Under this work assignment, the contractor shall continue to provide meeting logistical support for the above events as outlined in the following subtasks.

### **TASK 3.1: Meeting Planning**

For each meeting, the contractor shall participate in conference calls with the EPA WA COR, EPA technical lead(s), and other planning group members. The contractor shall interact with EPA and other external planning group members to help synthesize and formulate meeting topics, agendas, and recommendations for expert speakers. The contractor shall develop planning meeting minutes, interim meeting agendas, and other materials consistent with the planning group recommendations and short summaries of the topics discussed and any decisions or action items. The contractor shall also participate in periodic calls (approximately twice per week) with the EPA WA COR to discuss progress and relevant technical issues related to the work assignment tasks. The contractor shall help recruit potential speakers and meeting participants as outlined in this PWS.

As needed, the contractor shall identify a hotel room block (at government per diem rates) in the vicinity of the meeting location to accommodate non-local participants. The EPA WA COR will confirm the need for a hotel room block and estimated number of rooms needed via written technical direction.

### **TASK 3.2: Pre-Meeting and Registration Materials**

For each meeting, the contractor shall develop draft and final agendas, announcements/ invitations, speaker guidelines, logistical information sheets, and other materials as needed. The contractor shall provide draft versions of all materials to the EPA WA COR for review and approval. Final electronic copies shall be sent in source file format (e.g., MSWord 2007) and \*.pdf. As necessary, the contractor shall develop 508 compliant .pdf files or .html versions of final materials for inclusion on a registration web site or other sites. In some cases, the contractor shall be responsible for uploading these materials to a registration web site or other related web sites, as access permits.

For each meeting, the contractor shall compile a spreadsheet or mailing list of potential meeting invitees or participants. These lists shall include potential participants as provided by EPA; the lists may also include potential participants researched and identified by the contractor based on criteria supplied by EPA. The

contractor shall distribute (via email) electronic invitations, agendas, logistical materials, and other pre-meeting informational materials to potential participants.

For each meeting, the contractor shall develop an on-line registration system for tracking responses and registrant information for each meeting. The on-line system shall also include agendas, and other meeting or logistical information. The contractor shall make regular updates to the system to reflect changes in the agenda, schedule, logistics, etc., and shall post meeting-related announcements as available. The system may be linked to EPA or other relevant web sites as identified by the EPA WA COR. The contractor shall also manually enter responses into the registration system as needed. The contractor shall track responses to meeting invitations and monitor on-line registration, and shall provide the EPA WA COR with regular updates on registration and responses. The contractor shall handle or provide the EPA WA COR with materials to handle walk-in (non-preregistered) participants onsite at the meetings (see subtask 3.3 below).

### **TASK 3.3: Meeting Folders, Name Badges, and Other Materials/Handouts**

For each meeting, the contractor shall prepare minimal handouts and materials to distribute to meeting participants. Handouts may include copies of final agendas, participant lists, and additional materials as needed. EPA would like to go as paperless as possible when planning and coordinating these meetings. The contractor shall be prepared to upload all meeting materials to the workshop registration site and/or to provide materials to EPA for uploading on other web sites prior to the meeting. Following each meeting, the contractor shall ensure that all presentations and/or final copies of post-meeting materials are made available to participants via the on-line registration web site or some other mechanism.

If required, the contractor shall provide meeting folders containing copies of available agendas, participant lists, presentations, abstracts, evaluation forms, other newsletters or handouts, etc., as determined by the EPA WA COR. The contractor shall design and produce labels or covers for the folders. The contractor shall copy materials to be included in the folders; however, in some cases, EPA may provide materials that should be added to the folders.

For each meeting, the contractor shall develop name badges, exhibitor lists, directional signs, table tents, onsite registration lists and forms, sign-up sheets, evaluation forms, and other registration- and meeting-related materials, as needed. The contractor shall provide services for design and production of meeting-specific artwork and graphics to use on web sites, name badges, agenda, signage, posters, presentation templates, etc. The contractor shall provide copies of draft artwork and graphics to the EPA WA COR for approval before final production.

As needed, the contractor shall ship meeting materials to the EPA WA COR, or designated contact at the meeting facility in advance of the meeting. The contractor shall track shipment of materials to ensure they arrive safely and in good condition to the designated EPA or facility addressee. The contractor shall provide return shipping information and supplies in the event that any materials need to be returned to the contractor by the EPA WA COR.

### **TASK 3.4: Speaker Arrangements**

For each meeting, the contractor shall provide some support to identify and contact potential speakers or contact speakers suggested by the EPA WA COR. The contractor shall engage in discussions with speakers to determine willingness to participate and confirm availability, as needed. The contractor shall develop meeting-specific presentation templates (e.g., in PowerPoint) to provide to speakers [Note: presentation templates and associated graphics should be pre-approved by the EPA WA COR as outlined for pre-meeting materials under subtasks 3.2 and 3.3 above]. The contractor shall provide written (email) guidance to and contact speakers for

submission of electronic presentation materials (i.e., PowerPoint slides), abstracts, and short biographies as needed.

Once presentations and other speaker materials have been received, the contractor shall reformat as necessary for copying, uploading and distributing (or posting on web sites). The contractor shall make all speaker presentations available to the EPA WA COR prior to the start of the meeting via CD-ROM or other appropriate electronic media (USB drive), or through email and/or an Internet file-sharing platform. The contractor shall notify speakers who do not submit their presentations prior to the meeting to bring a copy of their electronic file to the meeting.

As necessary following the meeting, the contractor shall make all presentation files 508 compliant for purpose of posting them to the meeting registration web site or other web sites as applicable. The contractor shall post 508 compliant presentations and other materials as specified by the EPA WA COR to the meeting registration web site within one (1) week from the conclusion of the meeting. The contractor shall prepare and forward a CD-ROM containing all 508 compliant presentations and other materials from each meeting (abstracts, bios, presentations, etc.) to the EPA WA COR within two (2) weeks from the conclusion of the meeting.

See subtasks 3.8 and 3.9 below for additional event-specific support required from the contractor for making speaker arrangements.

#### **TASK 3.5: Meeting Evaluation Reports**

For each meeting, the contractor shall prepare a brief summary report of comments received on evaluation forms from meeting participants. At each meeting, the completed evaluation forms will be collected by the EPA WA COR and copies will be mailed to the contractor. The contractor shall provide an electronic copy of the source file (e.g., MSWord 2007) for the summary evaluation report to the EPA WA COR and EPA technical lead(s) within two (2) weeks from receipt of copies of the completed evaluation forms from the EPA WA COR.

#### **TASK 3.6: Post-Meeting Support**

Within one (1) week of the conclusion of each meeting, the contractor shall prepare and forward the following deliverables to the EPA WA COR: one (1) CD-ROM (or other appropriate electronic media) containing the final post-meeting participants list (updated based on actual attendees and walk-in registrants), final versions of all agendas (formatted), final speaker and/or participant biographies (formatted), electronic copies of posters displayed at the workshop, sign-in sheets, presentation templates (formatted), onsite walk-in registration forms, and any other final materials from the meeting. The contractor shall assure post-meeting materials are updated and posted on the event registration web site as applicable.

The following subtasks 3.7 through 3.11 outline event-specific support (if applicable) for each workshop or meeting in addition to the general meeting support outlined in subtasks 3.1 to 3.6 above.

#### **TASK 3.7: Confluence Second Anniversary Event (January 16, 2013)**

The "Confluence Second Anniversary Event—Technology and Policy Nexus" (tentative event title) is planned to be held January 16, 2013. The meeting will last one half (½) to one (1) full day and will be held at the EPA Andrew W. Breidenbach Environmental Research Center, Cincinnati, Ohio. The meeting may include up to 200 participants.

No additional support beyond subtasks 3.1 through 3.6 outlined above will be required for this event.

#### **TASK 3.8: Technology to Empower Citizen Scientists Workshop (March 25-27, 2013)**

The workshop "Technology to Empower Citizen Scientists" is planned to be held March 25-27, 2013. The meeting will last up to two and a half (2 ½) days and will be held at the Northern Kentucky University in Highland Heights, Kentucky. The meeting may include up to 60 participants.

In addition to the general meeting support outlined in subtasks 3.1 through 3.6 above, the contractor shall provide the following support for this event.

#### **TASK 3.8.1: Technology to Empower Citizen Scientists Workshop: Onsite Meeting Support**

For the "Technology to Empower Citizen Scientists" workshop, the contractor shall provide one (1) meeting coordinator with experience in convening technical meetings and performing registration activities to provide on-site logistical support during the meeting. EPA will confirm the requirement for an on-site meeting coordinator via written technical direction from the EPA WA COR. The contractor shall provide necessary onsite logistical support, including registering attendees, distributing name badges and other meeting materials, ensuring speakers are present, cueing speakers presentations, trouble-shooting with the facility, initiating remote or webinar conferencing capabilities, and other general logistical support needed for the meeting. The contractor shall coordinate with the meeting facility and onsite facility staff as appropriate. [Note: In the event that a meeting is to be held at a facility where onsite facility staff is under contract to the host organization, the contractor shall not initiate discussions with onsite facility staff until appropriate approval is received from the EPA WA COR.]

The contractor shall be prepared to handle walk-in (non-preregistered) participants, including accommodating for onsite registration forms, blank name badges, etc. As applicable, the contractor shall update the final meeting participants list based on information collected during registration and forward to the EPA WA COR. At the conclusion of the workshop, the contractor shall collect completed evaluation forms from participants. Any original completed evaluation forms shall be forwarded to EPA (see subtask 3.5).

#### **TASK 3.8.2: Technology to Empower Citizen Scientists Workshop: Speaker Arrangements**

For the "Technology to Empower Citizen Scientists" workshop, the contractor shall obtain up to twenty (20) expert guest speakers to provide presentations relevant to the meeting topics and materials and based on expertise criteria provided by EPA and the EPACOR. Details on the specific number of and criteria for expert speakers for each meeting will be provided via written technical direction from the EPA WA COR. The EPA WA COR or EPA technical lead(s) shall have final approval of guest speakers identified for each meeting. The contractor shall provide written guidance to speakers for submission of presentations and other materials as outlined under Task 3.4 above. The contractor's work plan shall include estimates to provide all costs associated with obtaining up to twenty (20) expert speakers to participate and present at this workshop.

#### **TASK 3.9: Innovative Technologies and Solutions for Non-Potable Reuse of Rain and Storm Water Workshop (April 2013)**

The workshop "Innovative Technologies and Solutions for Non-Potable Reuse of Rain and Storm Water" is planned to be held in April 2013 (dates TBD). The meeting will last up to two (2) days and will be held at the Duke Energy Main Offices in Cincinnati, Ohio. The meeting may include up to 150 participants.

In addition to the general meeting support outlined in subtasks 3.1 through 3.6 above, the contractor shall provide the following support for this event.

#### **TASK 3.9.1: Innovative Technologies and Solutions for Non-Potable Reuse of Rain and Storm Water Workshop: Onsite Meeting Support**

For the "Innovative Technologies and Solutions for Non-Potable Reuse of Rain and Storm Water" workshop, the contractor shall provide one (1) meeting coordinator with experience in convening technical meetings and performing registration activities to provide on-site logistical support during the meeting. EPA will confirm the requirement for an on-site meeting coordinator via written technical direction from the EPA WA COR. The contractor shall provide necessary onsite logistical support, including registering attendees, distributing name badges and other meeting materials, ensuring speakers are present, cueing speakers presentations, troubleshooting with the facility, initiating remote or webinar conferencing capabilities, and other general logistical support needed for the meeting. The contractor shall coordinate with the meeting facility and onsite facility staff as appropriate. [Note: In the event that a meeting is to be held at a facility where onsite facility staff are under contract to the host organization, the contractor shall not initiate discussions with onsite facility staff until approval is received from the EPA WA COR.]

The contractor shall be prepared to handle walk-in (non-preregistered) participants, including accommodating for onsite registration forms, blank name badges, etc. As applicable, the contractor shall update the final meeting participants list based on information collected during registration and forward to the EPA WA COR. At the conclusion of the workshop, the contractor shall collect completed evaluation forms from participants. Any original completed evaluation forms shall be forwarded to EPA (see subtask 3.5).

#### **TASK 3.9.2: Innovative Technologies and Solutions for Non-Potable Reuse of Rain and Storm Water Workshop: Speaker Arrangements**

For the "Innovative Technologies and Solutions for Non-Potable Reuse of Rain and Storm Water" workshop, the contractor shall obtain up to four (4) expert guest speakers to provide presentations relevant to the meeting topics and materials and based on expertise criteria provided by EPA and the EPA COR. Details on the specific number of and criteria for expert speakers for each meeting will be provided via written technical direction from the EPA WA COR. The EPA WA COR shall have final approval of guest speakers identified for each meeting. The contractor shall provide written guidance to speakers for submission of presentations and other materials as outlined under Task 3.4 above. The contractor's work plan shall include estimates to provide all costs associated with obtaining up to four (4) expert speakers to participate and present at this workshop.

#### **TASK 3.9.3: Innovative Technologies and Solutions for Non-Potable Reuse of Rain and Storm Water Workshop: Note Taker and Meeting Summary Report**

For the "Innovative Technologies and Solutions for Non-Potable Reuse of Rain and Storm Water" workshop, the contractor shall provide one (1) effective onsite note-taker to record meeting minutes, summary points, action items, and discussion items during the workshop. The contractor shall synthesize information onsite (and provide to the EPA WA COR), including action item lists, brief summaries, report outs, etc., as needed. If not developed onsite at the workshop, the contractor shall develop draft action items and forward to the EPA WA COR within one (1) week from the conclusion of the workshop.

The contractor shall prepare a draft and final workshop summary report highlighting workshop presentations, discussion points, panel discussions, question and answer sessions, and final action items. The contractor shall submit electronic copies of the draft summary report, in source file (e.g., MSWord 2007) and \*.pdf formats, to the EPA WA COR and EPA technical lead(s) for initial review and comment. The draft summary report shall be submitted to the EPA WA COR within two (2) weeks from the conclusion of each workshop. The contractor shall also send the draft summary report to appropriate planning group members, workshop speakers or other parties as necessary for review and comments.

The contractor shall receive comments, follow up on comments as necessary with reviewers or EPA, and revise the draft summary report. The contractor shall format the final summary report. The contractor shall provide

the EPA WA COR with the final summary report within one (1) week from the deadline for receipt of comments from all reviewers. The contractor shall have the report edited prior to submitting to EPA. The final meeting summary report should be provided to the EPA WA COR electronically, in source file (e.g., MSWord 2007) and \*.pdf formats.

EPA anticipates that up to two (2) review cycles shall be needed to finalize each workshop summary report.

The contractor shall develop electronic copies of the summary report that are suitable for posting to EPA's web site. These electronic copies shall comply with Section 508 of the Rehabilitation Act, as well as any other standards or guidance set or required by EPA ORD.

#### **TASK 3.10: Technology Commercialization Bootcamp (Spring 2013)**

The Technology Commercialization Bootcamp is planned to be held in Spring 2013 (dates TBD). The meeting will last up to one (1) full day and will be held at the EPA Andrew W. Breidenbach Environmental Research Center in Cincinnati, Ohio. The meeting may include up to 100 participants.

No additional support beyond subtasks 3.1 through 3.6 outlined above will be required for this event.

#### **TASK 3.11: Small Business Innovation Research (SBIR) Workshop (Spring 2013)**

The SBIR Workshop is planned to be held in Spring 2013. The meeting will last up to one and a half (1 ½) days. The dates and location are TBD. The meeting may include up to 100 participants.

No additional support beyond subtasks 3.1 through 3.6 outlined above will be required for this event.

#### **TASK 4: Webinar Support**

In addition to the meetings outlined in Task 3 above, the contractor shall provide logistical and technical support one (1) webinars related to technology development and commercialization. The webinar will be held between January and November 2013 (date TBD). The webinar will last up to one (1) day, and will include up to 150 participants. For the webinar, the contractor shall provide the following support:

- Make all necessary arrangements for setting up and conducting webinar services
- Host webinar events/materials on own site or provide access to a webinar service or site to manage these activities
- Develop draft and final invitations, agendas, logistical information sheets, and other materials for webinars, as needed; provide draft versions of all materials to the EPA WA COR for review and approval
- Post .pdf or .html versions of final materials on the webinar site or other web sites
- Distribute (via email) electronic invitations, agendas, logistical materials, and other pre-webinar informational materials to potential participants
- Track participant responses and registrant information for webinars, e.g., through an on-line registration system or some other mechanism, and provide the EPA WA COR with regular updates on confirmed participants for each webinar
- Develop guidelines for submission of webinar presentations to the contractor or uploaded directly to the webinar site and distribute guidelines to speakers
- Contact speakers for submission of presentation materials, abstracts, and short biographies as needed
- As needed, upload any speaker presentations, webinar materials, or other information to the webinar site or other web sites prior to the start of the webinar
- Send instructions for accessing webinar conferencing to participants

- Provide logistical support before and during webinars to ensure functionality and trouble-shoot in the event of any issues
- Provide one (1) effective note-taker to participate in webinars and record meeting minutes, summary points, action items, and discussion items.
- Prepare and forward an original and duplicate CD-ROM containing all presentation materials from each webinar (abstracts, bios, presentations, etc.) to the EPA WA COR within one (1) week from the conclusion of the webinar
- Prepare a draft and final webinar summary report highlighting key points from presentations, discussion periods, question and answer sessions, and action items
- Submit electronic copies of the draft summary report (in source file format) to the EPA WA COR within one (1) week from the conclusion of each webinar, and the final summary report within three (3) weeks from conclusion of each webinar.

In addition to above support, for the webinar, the contractor shall obtain one (1) expert guest speaker to provide presentations relevant to the webinar topics and materials and based on expertise criteria provided by. Details on criteria and presented material for the expert speaker will be provided via written technical direction from the EPA WA COR. The EPA WA COR shall have final approval of the guest speaker identified. The contractor shall provide written guidance to the speaker for submission of their presentation and other materials as outlined above. The contractor's work plan shall include estimates to provide all costs associated with obtaining an expert speaker to present on the webinar.

#### **TASK 5: Development of Technology Transfer Documents and Materials**

In keeping with NRMRL's goal of supporting the development and implementation of innovative technology solutions, the contractor shall provide support to develop, finalize and produce technology transfer documents and materials. These materials may include fact sheets, technology "road"-maps, graphic files, technical posters, handouts, web materials or other general informational materials to inform others about EPA's collaborative approaches to technology research, development, and deployment and participation in *Confluence*. In general, technical content for inclusion in these technology transfer documents and materials will be provided by the EPA WA COR or can be synthesized from existing documents or resources. For some materials, the contractor may be required to perform minimal research (Internet or literature searches) to obtain additional information to support development of technology transfer documents and materials.

**NOTE:** Development of a number of technology transfer documents and materials was begun under the previous work assignment (Contract EP-C-08-010, Work Assignment 3-44). This includes: development of technical posters for EPA cluster funding projects, development of 100<sup>th</sup> water research anniversary graphics and outreach materials, updates to the EPA Cincinnati Water Research timeline poster, regional technology ecosystem mapping poster and web material, and others. The contractor's work plan and cost estimate should take into consideration funds/LOE already spent toward development of these materials and should reflect work required to complete these materials.

Under this work assignment, the contractor shall complete development of the above materials. EPA also anticipates that up to two (2) additional fact sheets/handouts (1-2 pages in length) and up to four (4) additional posters will need to be developed by the contractor.

The contractor shall submit electronic copies of all draft documents, posters or materials, in source file (e.g., InDesign, MSWord 2007) and \*.pdf formats, to the EPA WA COR for initial review and comment. The contractor shall receive comments on draft materials, revise materials accordingly, and resubmit materials to the EPA WA COR within one (1) week from receipt of comments. The contractor shall submit final, formatted materials to the EPA WA COR electronically, in source file (e.g., MSWord 2007) and \*.pdf formats. The contractor shall have all materials edited prior to submitting to EPA. The contractor shall develop electronic

copies of materials that are suitable for posting to EPA's technology transfer and collaboration web site as well as other related web sites. These electronic copies shall comply with Section 508 of the Rehabilitation Act, as well as any other standards or guidance set or required by EPA NRMRL.

## DELIVERABLES AND PROJECT SCHEDULE

All deliverables shall be submitted to the EPA WA COR according to the following schedule.

<b>TASK 1: Prepare Work Plan</b>	
Work plan due	In accordance with the contract clauses
<b>TASK 2: Work Assignment Kick-Off Meeting</b>	
Kick-off meeting (via conference call)	Within two (2) weeks of work assignment issuance
<b>TASK 3: Meeting Logistical Support</b>	
<b>On-going through 11/30/13</b>	
<b>Subtask 3.1: Meeting Planning</b>	On-going through 11/30/13 for each of the five meetings per technical direction from EPA WA COR
<b>Subtask 3.2: Pre-Meeting and Registration Materials</b>	On-going through 11/30/13 for each of the five meetings per technical direction from EPA WA COR
<b>Subtask 3.3: Meeting Folders, Name Badges, and Other Materials/Handouts</b>	On-going through 11/30/12 for each of the five meetings per technical direction from EPA WA COR
<b>Subtask 3.4: Speaker Arrangements</b>	On-going through 11/30/12 for each of the five meetings per technical direction from EPA WA COR
	For each of five meetings: CD-ROM (or other media) containing 508 compliant presentations and other materials due within two (2) weeks from the conclusion of the meeting
	For each of five meetings: posting of 508 compliant presentations and other materials to the registration web site within one (1) week from the conclusion of the meeting
<b>Subtask 3.5: Meeting Evaluation Reports</b>	For each of five meetings: summary evaluation report due two (2) weeks from receipt of evaluation forms from EPA WA COR
<b>Subtask 3.6: Post-Meeting Support</b>	For each of five meetings: one (1) CD-ROM (or other media) containing final copies of participants list, agendas, biographies, posters, sign-in sheets, presentation templates, walk-in registration forms, and any other materials due within one (1) week from conclusion of meeting
<b>Subtask 3.7: Meeting Support for Confluence Second Anniversary Event</b>	Event to be held January 16, 2013; Support on-going through 3/16/13 per technical direction from EPA WA COR
<b>Subtask 3.8: Meeting Support for Technology to Empower Citizen Scientists Workshop</b>	Event to be held March 25-27, 2013; Support on-going through 5/27/13 per technical direction from EPA WA COR
<b>Subtask 3.9: Meeting Support for Innovative Technologies and Solutions for Non-Potable Reuse of Rain and Storm Water Workshop</b>	Event to be held April 2013; Support on-going through 6/30/13 per technical direction from EPA WA COR
<b>Subtask 3.9.3: Meeting Summary Report for Innovative Technologies and Solutions for Non-Potable Reuse of Rain and Storm Water Workshop</b>	Workshop action items due one (1) week from the conclusion of the meeting
	Draft summary report due two (2) weeks from the conclusion of the meeting
	Final summary report due one (1) week from the receipt of comments from all reviewers and EPA WA COR
<b>Subtask 3.10: Meeting Support for Technology Commercialization Bootcamp Event</b>	Event to be held Spring 2013; Support on-going through 11/30/13 per technical direction from EPA WA COR
<b>Subtask 3.11: Meeting Support for Small Business Innovation Research (SBIR)</b>	Event to be held Spring 2013; Support on-going through 11/30/13 per technical direction from EPA WA COR

Workshop	
<b>TASK 4: Webinar Support</b>	
Support for up one (1) webinars	On-going through 11/30/13 per technical direction from EPA WA COR
	Original and duplicate CD-ROM containing all webinar presentation materials due within one (1) week from conclusion of webinar
	Draft summary due one (1) week from conclusion of webinar; final summary report due three (3) weeks from conclusion of webinar
<b>TASK 5: Development of Technology Transfer Documents and Materials</b>	
Development of materials, including fact sheets, posters, handouts, etc.	On-going through 11/30/13 per technical direction from EPA WA COR

## DELIVERABLE ACCEPTANCE CRITERIA

The following deliverable acceptance criteria will be used to assess deliverables submitted under Tasks 1 through 5 of this PWS.

All deliverables shall be submitted to the EPA WA COR according to schedule and in appropriate formats as outlined in the PWS. All electronic materials should be complete and of high production quality. Reports shall be edited by a technical editor prior to submission to the EPA WA COR. All electronic materials shall comply with Section 508 of the Rehabilitation Act, as well as any other standards or guidance provided through written technical direction from the EPA WA COR.

## SPECIAL REPORTING

The contractor's Monthly Progress Report shall include a detailed description of any technical direction issued by the EPA WA COR and accepted by the contractor. The contractor shall maintain a list of all accepted technical direction issued during the work assignment. The contractor's Monthly Progress Report shall also include a break-out of cumulative costs (LOE, ODCs, etc.) associated with performing each of the Tasks 1 through 5 as outlined in this PWS. Additionally, the contractor's progress report shall include:

- A breakout of LOE/costs per meeting for each of the five (5) meetings outlined in Task 3, and then per subtask under Task 3 (for each of the meetings)
- A breakout of LOE/costs associated with individual technology transfer documents and materials (or products) under Task 5

## MANAGEMENT CONTROLS

Technical direction will be provided by the EPA WA COR throughout performance of the PWS. Periodic meetings between the EPA WA COR and contractor are encouraged to discuss any questions that may arise during the performance or completion of this work assignment. At the EPA WA COR's discretion, these meetings may occur via teleconference or video conferences. The contractor shall document these meetings and submit copies of this correspondence to the EPA WA COR.

The EPA WA COR may identify one or more EPA technical lead(s) for this work assignment. Interaction between the contractor and any EPA technical lead(s) designated by the EPA WA COR is solely for the purpose of presenting and discussing the information, analyses, results or presentations related to this work assignment. The interaction will be technical communication, not technical direction. Per the technical direction clause EPAAR 1552.237-71 of the contract, the EPA PO COR and the EPA WA COR or alternate EPA WA COR are the only representatives of the CO authorized to provide technical direction.

In all meetings, conferences, symposia, etc. participated in as a part of satisfying the terms of this work assignment, contractor personnel shall be clearly identified through the use of name badges that indicate their corporate affiliation. Contractor personnel shall clearly identify themselves as contractors when contacting workshop participants, speakers or other individuals or organizations during the performance of this effort.

The contractor shall ensure that the work done under this project does not contain any real or apparent personal or organizational conflicts of interest.

The contractor shall maintain the confidentiality of any confidential business information collected as part of this effort.

The contractor shall comply with Government Printing Office guidelines during the performance of this effort.

The contractor shall comply with Paperwork Reduction Act guidelines during the performance of this effort.

The contractor shall inform the EPA WA COR verbally or in writing within two (2) businesses day if any significant problems arise, as well as any corrective actions and potential impacts on project deliverables, costs, etc.

## **TRAVEL**

Per the contract clause Local LC-31-08, Approval of Contractor Travel, any non-local travel directly chargeable to this work assignment shall be submitted and approved by the proposed travel dates as identified by the EPA WA COR via technical direction. It is expected that the contractor will be requested to participate at meetings to be held in the Cincinnati-Dayton-Northern Kentucky region between January 2013 and November 2013.